

MedRight ***Home Care Scheduling System***

Version 4.03+
Featuring SmartCheck Technology

User Manual

SPECIAL NOTICE

Year 2000

Software Inventors has tested **MedRight** to verify its operation in the year 2000 and beyond. We have found the system to operate properly and produce accurate patient schedules. In addition, the vendor of the computer language in which **MedRight** is written has indicated that the system will operate properly through the year 2100.

Software Inventors, however, makes no warranty (express or implied) with respect to the accuracy of **MedRight** in the year 2000 or beyond. It is strongly recommended that you test the system's performance to ensure its proper operation and accuracy for your purpose.

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INTRODUCTION

The **MedRight Home Care Scheduling System** version 4.0+ is the most advanced **MedRight** patient scheduling system created to date! Complete with our exclusive SmartCheck technology, version 4.0+ provides unparalleled ease-of-use and reliability.

Designed to provide the phlebotomy service provider with a marketing and operational advantage in the homecare marketplace, the system is a proven patient management system which allows professional staff to spend more time caring for patients by relieving them of tedious and error-prone paperwork.

MedRight provides the ability to record patient demographic, billing, and test order information. Once entered, the system accurately tracks and schedules each patient's laboratory tests. Printed test draw list and requisition forms and a variety of reports can be generated to assist in providing superior patient care.

Incorporating one of the industry's most sophisticated and efficient scheduling algorithms, this unique system can precisely match any testing pattern, regardless of complexity. In addition, the system minimizes special phlebotomy trips by scheduling tests, whenever possible, on normal phlebotomy days. The results are a streamlined operation with increased revenues and minimized costs.

Used properly, the **MedRight Home Care Scheduling System** significantly improves the quality of patient care, minimizes patient discomfort, enhances quality assurance programs, and builds a successful and mutually beneficial relationship between the phlebotomy service provider and clients.

GETTING STARTED

First, familiarize yourself with the basic capabilities of the **MedRight Home Care Scheduling System** by reading through this manual.

In order to realize the maximum benefit from this powerful system, analyze the current manual operation and identify all of the tasks currently being performed by the staff. With **MedRight**, some of these tasks may no longer be necessary, others may require major changes, while some will stay the same.

Try redesigning the operation from the ground up, drawing on the features and flexibility offered by the system. Like any new tool, simply 'shoe-horning' this system into the existing operation will be a frustrating experience with no real payoff.

Review the various reports available and identify their best use for your marketplace. If possible, reports should be generated in a 'batch' mode for all phlebotomy routes and clients. This will tremendously simplify operations!

The MedRight Home Care Scheduling System is a network-ready, multi-user system - allowing multiple workstations to maintain data or generate reports simultaneously. No processing occurs except under the control of the user and all patient data is directly maintainable, at any time.

Functions which require heavy user interaction, such as patient entry, are designed to provide fast response time. Likewise, complex and high-volume functions, such as requisition generation, can be performed in a 'batch' mode. This design approach frees personnel to attend to other tasks while the computer runs unattended.

All of **MedRight's** functions are grouped, by category, onto 2 easy-to-use menus. Commonly used functions appear on the main menu with system configuration functions on a secondary menu. Choosing a menu option is as simple as clicking on a menu button.

The system's exclusive SmartCheck technology constantly monitors data entry functions, ensuring that information is reasonable. Convenient on-screen prompts and help messages step the user through operating the functions, with a minimum of training.

USING THE SYSTEM

*Installing **MedRight***

MedRight version 4.0+ requires the following minimum system specifications:

- Pentium processor
- 128mb RAM
- 20mb Hard Disk space
- CD-ROM
- Microsoft Windows 98, NT, ME, 2000, XP, or Vista

To install **MedRight** on your computer, follow these easy steps. At any time, should you encounter any problems or have questions, feel free to contact us at (716) 592-2397. We will be pleased to walk you through the installation process.

1. Insert the **MedRight** installation CD.
2. If the Setup program does not start automatically:
Click on START, then RUN
Enter the command x:SETUP ('x' is the CD drive).
3. Choose the default answers to the installation questions.

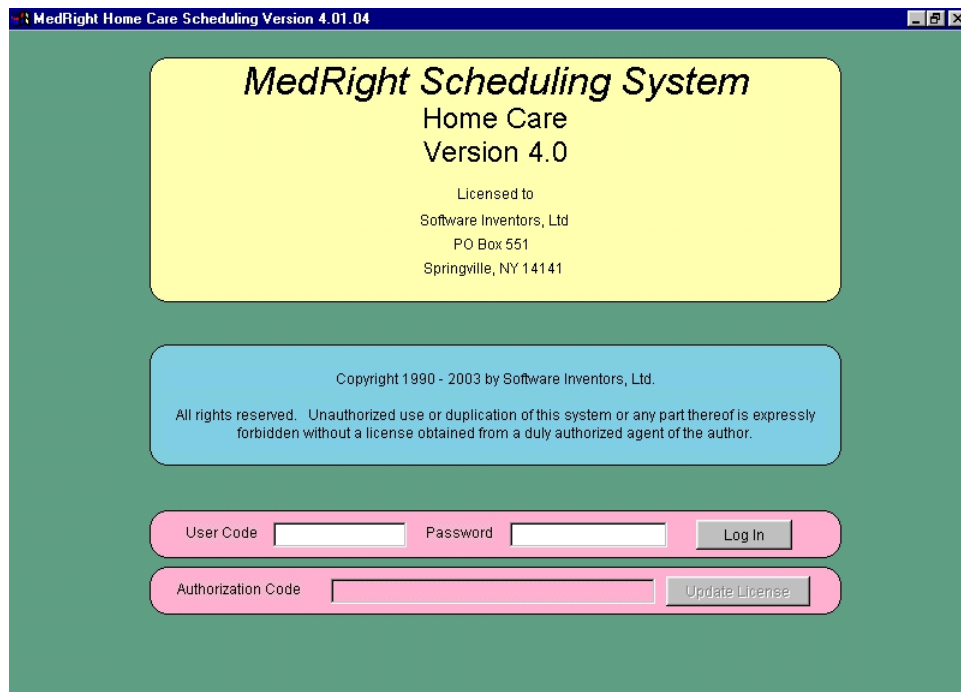
*Starting **MedRight***

Following installation, locate the **MedRight** program group in the Start Menu and choose the Home Care Scheduling system. If the program group does not appear, **MedRight** may be started via Windows Explorer by executing the PHL40.EXE file located in the \ **MedRight** folder.

When the introductory **MedRight** screen appears, you will be asked to enter a username and password. Use the User Code & Password which was included with your shipment for this initial entry into the system.

IT IS STRONGLY RECOMMEND THAT THE PASSWORD SHIPPED WITH THE SYSTEM BE MODIFIED TO PREVENT UNAUTHORIZED ACCESS TO THE SYSTEM.

The system's Main Menu screen will now be displayed, and you're 'off & running'!



The screenshot shows a window titled "MedRight Home Care Scheduling Version 4.01.04". The main content area has a green background. At the top, a yellow rounded rectangle contains the text "MedRight Scheduling System", "Home Care", "Version 4.0", and "Licensed to Software Inventors, Ltd, PO Box 551, Springville, NY 14141". Below this, a light blue rounded rectangle contains copyright information: "Copyright 1990 - 2003 by Software Inventors, Ltd. All rights reserved. Unauthorized use or duplication of this system or any part thereof is expressly forbidden without a license obtained from a duly authorized agent of the author." At the bottom, there are two pink rounded rectangles. The first contains "User Code" and "Password" labels with input fields, and a "Log In" button. The second contains an "Authorization Code" label with an input field and an "Update License" button.

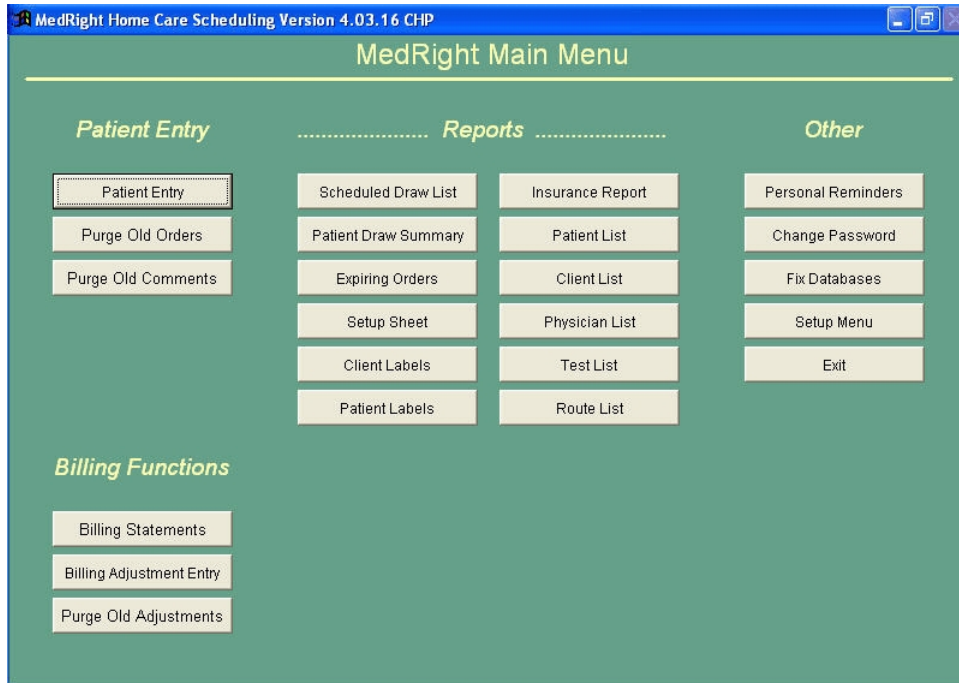
*Exiting **MedRight***

To exit **MedRight**, always choose the Exit option of **MedRight's** Main Menu.

Finding Patients

It is not necessary to know the correct or complete spelling of an individual's name in order to locate them. Type at least one letter at the Last Name prompt and click FIND. **MedRight** will then display the first alphabetical match.

Use the PREV and NEXT buttons to move alphabetically forward and backward through the patients. Choose the desired individual by clicking EDIT.



Alternately, patients may be located via their patient number. Either the full number, or a portion of the number may be entered. **MedRight** will then display the first patient found which matches the entry. Use the PREV and NEXT buttons to move numerically forward and backward through the patients.

For example, to find Robert Smith, any of the following methods may be used:

1. Enter 'S' at the last name prompt. **MedRight** will display the name of the first individual found in the database whose last name begins with 'S'. Use the down arrow key to find Robert Smith.
2. Enter 'SMI' at the last name prompt. **MedRight** will display the name of the first individual found in the database whose last name begins with 'SMI'. Use the up & down arrow key to find Robert Smith.
3. Enter 'SMITH' at the last name prompt. **MedRight** will display the name of the first 'SMITH' found in the database. Use the up & down arrow key to find Robert.
4. Enter 'SMITH' at the last name prompt and 'ROBERT' at the first name prompt. **MedRight** will display the name of the first 'ROBERT SMITH' found in the database.

5. Enter Robert Smith's patient number at the Patient # prompt.

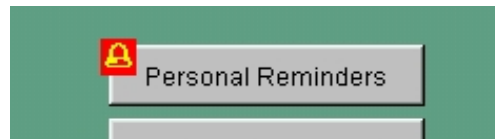
Finding Clients, Tests, and Routes

When changing client, test, or route information, it is not necessary to know the complete client number, test code, or route code. Enter at least one letter of the number or code and press FIND. **MedRight** will then display the closest match on the screen.

Use the PREV and NEXT buttons to scroll forward and backward through the clients, tests, or routes. Choose the desired entry by pressing EDIT.

Personal Reminders

The **MedRight Home Care Scheduling System** provides the ability to record various dates and related notes of which you would like to be reminded. Each time the **MedRight** main menu is activated, your personal reminder list is checked and an alarm displayed if any items are due or overdue.



SETTING UP THE SYSTEM

Prior to entering any patient information into ***The MedRight Home Care Scheduling System***, the following items must be set up in the system's master files:

Client File

Enter each client's account number, name, and address. Optionally, two telephone numbers, a fax number, and up to 26 customized test codes may be entered.

No patient may be entered into the system for a client who does not appear in this file.



Test File

Enter the various laboratory tests. Required information includes the test code and name. In addition, fasting information and a note may be entered. If desired, tests may be grouped so that multiple requisitions are printed for the patient. This feature allows tests such as 4pm Glucose

to appear on requisitions separate from other tests being performed for the patient.

Physician List

This optional entry allows the creation of a master list of physicians along with other information, which can be displayed during patient entry and maintenance.

User Access

Create individual user codes and passwords to limit access to the system's features.

Preferences

Form Specs

Enter the type of requisition, requisition summary, label, and testing summary format and sort order.

Compliance Settings

Enter the Medicare compliance settings to be used by the system when validating test orders.

Phlebotomy Service Telephone Number

Enter the desired telephone number for client calls.

ADD or CHANGE CLIENTS

Location Main Menu ▢▢▢▢
 Setup Menu ▢▢▢▢
 Client Entry

To locate a specific client, enter all or part of the client's name or number, then press FIND. Scroll through clients by pressing the PREV and NEXT buttons. If the last FIND was performed on a client name, PREV and NEXT scroll alphabetically, otherwise the scroll is by client number. Click ADD to add a new client.

Prompts	Client #	Enter the 10 character client number.
	Client Name	Enter the client name, up to 30 characters.
	Address	Enter the first line of the client's address, up to 30 characters.
	Address	Enter the second line of the client's address, up to 30 characters.

Telephone #	Enter the telephone number.
Fax #	Enter the fax number.
Comment	Enter a client comment, up to 60 characters.
Print Insurance Info..	Enter Y to print patient's insurance information on draw lists
Phlebotomy Charges	Enter the amount, if appropriate, for STAT and routine draws. These amounts will be applied for each patient drawn on a specific draw date. The facility charge is applied just once for each client on a specific draw date.
Customized Requisition Tests	Enter up to 26 test codes which will appear on the client requisitions.
Client Notes	Enter an unlimited number of notes concerning client.

Notes

Client comments are automatically copied to the patient comment field when entering a new patient.

Client notes may be displayed from the patient and test order screens.

ADD or CHANGE PHYSICIAN INFORMATION

Location Main Menu ▢▢▢▢
 Setup Menu ▢▢▢▢
 Physician Entry

MedRight Home Care Scheduling Version 4.01.04

Physician Information

Physician

Find Prev Next Edit Add Save Delete Exit

Physician Information

Client #

Last Update

To locate a specific physician, enter all or part of the physician's name, then press FIND. Scroll through physicians by pressing the PREV and NEXT buttons. Click ADD to add a new physician.

Prompts	Physician Information	Enter the client name and other information, up to 30 characters.
	Client #	Enter the 10 character client number.

Notes Physician entries may be displayed from the patient entry screen. However, unlike clients and tests, a physician DOES NOT need to be set up prior to entry on a patient screen.

Refer to 'Update Nursing Home' to update a **MedRight Nursing Home Scheduling** system with this system's physician information.

ADD or CHANGE TESTS

Location Main Menu ▢▢▢
 Setup Menu ▢▢▢
 Test Entry

To locate a specific test, enter all or part of the test's name or code, then press FIND. Scroll through tests by pressing the PREV and NEXT buttons. If the last FIND was performed on a test name, PREV and NEXT scroll alphabetically, otherwise the scroll is by test code. Click ADD to add a new test.

Prompts	Test Code	Enter the test code, up to 10 characters in length.
	Make EZOrder Panel	Check box to create an EZOrder Panel test.
	Test Name	Enter the test name, up to 30 characters.

Fasting Specimen	Enter 'Y' if the test requires a fasting specimen, 'S' if fasting is suggested, or 'N' if no fasting is required. Optionally, enter the number of fasting hours required.
Test Note	Enter an optional note, up to 60 characters.
Test Group	Enter an optional test group, up to 1 character. When scheduled requisitions are printed, tests for a single patient are printed on separate requisition forms, according to their group.
CPT4 Codes	Enter up to 10 CPT4 codes associated with this test code.
EZOrder Panel Components	Enter up to 10 'regular' test codes which define this EZOrder panel.

Notes

Test notes will be printed on requisitions and can be used to store specimen collection information or to identify the components of the test.

Use the test group feature to specify tests which should appear on a requisition form by themselves. For example, to cause **MedRight** to print 4pm Glucose tests onto a separate requisition from the patient's morning CBC test, enter a different group for the 4pm Glucose than that used for the CBC.

EZOrder panels are designed for convenience when ordering multiple single tests. Create EZOrders for frequently ordered combinations of individually-ordered tests to streamline the laboratory's operations. When entering test orders for a patient, an order for the EZOrder panel 'explodes' into its component tests, with each component appearing as a separate test order. At no time does the EZOrder test actually appear as an order for the patient.

Location

- Main Menu ▸▸▸
- Setup Menu ▸▸▸
- Route Entry

To locate a specific route, enter all or part of the route's name or code, then press FIND. Scroll through routes by pressing the PREV and NEXT buttons. If the last FIND was performed on a route name, PREV and NEXT scroll alphabetically, otherwise the scroll is by route code. Click ADD to add a new route.

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after an override message is confirmed
by the operator.

Notes

ADD A NEW USER CODE

Location Main Menu ▸
 Setup Menu ▸
 User Access

The screenshot shows a software window titled "MedRight Home Care Scheduling Version 4.03.16 CHP" with a subtitle "User Access Information". The window has a green header bar. Below the header, there is a "User Code" input field and a set of buttons: "Find", "Prev", "Next", "Edit", "Add", "Save", "Delete", and "Quit". The main area of the window is yellow and contains several input fields and dropdown menus. On the left, there are fields for "User Code", "Name", and "Password". Below these are four dropdown menus labeled "Allow:", "Purge Outdated Records", "Report Generation", and "Billing Functions". On the right, there is a "Setup Menu" dropdown menu followed by four more dropdown menus labeled "Client/Doctor Entry", "Test Entry", "User Code Entry", and "Preferences Entry". At the bottom left, there are two date fields: "Last Password Change" and "Last Login to MedRight", each with a format of " / /". At the bottom center, there is a "Last Update" field with a format of " / /". A message in the top right of the yellow area states: "All Changes Take Effect the Next Time User Logs Into MedRight".

To locate a specific usercode, enter all or part of the code, then press FIND. Scroll through users by pressing the PREV and NEXT buttons. Click ADD to add a new usercode.

Prompts	User Code	Enter the 3-6 character code, consisting of any characters on the keyboard.
	User Name	Enter the user name, up to 15 characters.
	Password	Enter a 3-6 character password, consisting of any characters on the keyboard. Note that alphabetic characters are not case-sensitive and automatically converted to upper-case.

Allow

Choose either 'Y' or 'N' if the user code is to be allowed to perform functions indicated by each of the categories listed:

- Patient Maintenance
- Purging Outdated Information
- Report Generation
- Billing Functions
- Master File Maintenance
- User Code Maintenance

Notes

It is recommended that each staff member have a unique user code and that the passwords for the 'ADMIN' and 'ALL' codes be changed.

With the exception of the password and user name, the ADMIN user code may not be modified.

IT IS STRONGLY RECOMMEND THAT THE PASSWORDS SHIPPED WITH THE SYSTEM BE MODIFIED TO PREVENT UNAUTHORIZED ACCESS TO THE SYSTEM.

ENTER or CHANGE FORM SPECIFICATIONS

Location Main Menu ➡
 Setup Menu ➡
 Set Preferences

Prompts	Requisition Format	Enter the number of the desired format.
	Print Waiver	Choose 'Y' to automatically print the Medicare Beneficiary Waiver on Medicare patient requisitions.
	Barcode Patient #	If enabled on your license, choose 'Y' to print a barcode on the requisition
	Requisition Summary F...	Enter the number of the desired format.
	Test Summary Format	Enter the number of the desired format.
	Expiring Test Order F...	Enter 1 for the report format, 2 for the letter format.

Letter Salutation

Enter the phrase to be used at the start
of Expiring test order letters

Notes

MedRight systems which have been customized may ignore some
of all of these settings.

We recommend that you print samples of the various report
formats and sort orders to determine the most appropriate option
for your clients.

Settings are saved automatically when the EXIT button is pressed.

ENTER or CHANGE REQUISITION DRAW FEES

Location Main Menu ►►►
 Setup Menu ►►►
 Set Preferences

MedRight Home Care Scheduling Version 4.01.04

System Preferences

Find Prev Next Edit Add Save Delete Exit

Form Settings & Draw Fees Compliance Settings & File Locations MedRight License

Requisition Format 1 Billing Test Code 1

Print Medicare Waiver Y Billing Test Name 1

Barcode Patient Number N Billing Test Code 2

Requisition Summary Format 1 Billing Test Name 2

Test Summary Format 1 Billing Test Code 3

Expiring Test Order Format 2 Billing Test Name 3

Expiring Test Letter Salutation Dear Doctor.

Prompts Code Enter draw fee test code, up to 10 characters.

 Name Enter draw fee name associated with code, up to 30 characters.

Notes MedRight systems which have been customized may ignore some or all of these settings.

Draw fees are printed on all requisitions.

Settings are saved automatically when the EXIT button is pressed.

ENTER or CHANGE COMPLIANCE SETTINGS

Location Main Menu ▸
 Setup Menu ▸
 Set Preferences

Prompts	Check Diagnosis...	Choose 'Y' if the system is to check the validity of ICD9 codes for test orders.
	Check Medicare...	Choose 'Y' if the system is to verify the medical necessity of Medicare orders.
	Apply Medicare Rules To All Patients	Choose 'Y' if the system is to verify medical necessity regardless of insurance type.
	ICD9 Codes to be... with	Choose 'Y' if ICD9 codes will be entered a decimal point or N to enter ICD9 codes without decimal points.
	Limit Duration of...	Enter the maximum number of months for which standing orders may be entered, either 6 or 12.

Notes **MedRight** systems which have been customized may ignore some or all of these settings.

Settings are saved automatically when the EXIT button is pressed.

PATIENT & TEST ORDER ENTRY

The **MedRight Home Care Scheduling System** stores demographic (ex. name, birth date), billing (insurance), and test order information on patients.

Since all of a patient's information may not be available to the laboratory at the same time, billing and test order information may be entered separately from the demographic information.

To set up a patient, the following must be known:

- Patient Number (typically, Social Security Number)
- Patient Name
- Gender
- Attending Physician

Take caution to avoid entering the same patient under 2 different patient numbers. This can easily occur if the home care client is prone to mix-ups and sends 2 copies of the patient's paperwork to the laboratory. **MedRight's** exclusive SmartCheck technology can notify you of patients with similar names, birth date, and gender.

Test orders should be entered exactly as indicated by the client. There is no need to 'translate' orders, such as changing a monthly CBC to every 4 weeks. **MedRight** is flexible enough to handle any type of order requested by the patient's physician, and should be entered as indicated to maintain a clean audit trail.

The **MedRight Home Care Scheduling System** can produce reports covering any period of time in the past or future. The ability to produce historical reports can be valuable to clients as a means of monitoring their in-house quality assurance / risk management activities.

Historical reporting is not possible if patient test orders are deleted from the computer when the order is discontinued by the physician. Therefore, if historical reporting is to be offered, do not delete test orders for patients. Rather, indicate the appropriate 'End Date' for the test order. Likewise, if the schedule frequency of a test order is changed, do not change the frequency within the system. Place an 'End Date' on the old order and enter a new one with the new frequency.

In this way the ***MedRight Home Care Scheduling System*** always 'knows' the past test order pattern for the patient and can produce accurate historical reports for the clients.

ADD or CHANGE PATIENTS

Billing and Demographic Information

Location Main Menu ➡
 Patient Entry

To locate a specific patient, enter all or part of the patient's name or code, then press FIND. Scroll through patients by pressing the PREV and NEXT buttons. If the last FIND was performed on a patient name, PREV and NEXT scroll alphabetically, otherwise the scroll is by patient code. Click ADD to add a new patient. Click DELETE to remove a patient from the system.

Prompts	Last Name	Enter the patient's last name, up to 20 characters.
	First Name	Enter the patient's first name, up to 15 characters.
	Patient #	Enter the 9 digit number assigned to this patient. Typically the patient's Social Security Number is used.

An optional 10th character may be entered in those rare cases where multiple patients share a common Social Security Number.

Client #	Enter the 10 character client number.
SS#	Enter the patient's Social Security Number, if not used as the Patient #
Gender	Enter 'F' for female or 'M' for male.
Birth Date	Enter the patient's date of birth. If earlier than 1900, enter the 4 digit year (ie. 1892).
Physician	Enter the patient's physician name, up to 30 characters.
Lab ID	Enter the laboratory client's identification number for this patient, up to 30 characters.
Patient Address	Enter the street address and city of the patient, up to 30 characters each.
Patient Telephone	Enter the telephone number of the patient.
Route	Enter the phlebotomy route to which the patient is assigned.
Phlebotomist Note	Enter phlebotomy notes, up to 75 characters. These appear on patient requisitions.

MedFlight Home Care Scheduling Version 4.01.04

Patient Information

Last Name First Find

or Patient #

Demographics	Insurance	Test Orders	Date Specific Comments	Patient Notes
Last Name <input type="text"/> First <input type="text"/> Patient # <input type="text"/>				
Medicare <input type="text"/>				
UPIN <input type="text"/>				
Medicaid <input type="text"/>				
Private Ins <input type="text"/>				
Policy <input type="text"/> Group <input type="text"/> Category <input type="text"/>				
Phys ID <input type="text"/>				
Relation <input type="text"/> 1=Self 2=Spouse 3=Depend 4=Other				
Insured Name Last <input type="text"/> First <input type="text"/>				

Medicare #

Enter the patient's Medicare Id number, up to 14 characters.

UPIN #

Enter the attending physician's UPIN number, up to 6 characters.

Medicaid #

Enter the patient's Medicaid Id number, up to 20 characters.

Private

Enter the name of the patient's private insurance company, up to 20 characters. Up to 2 private insurances may be entered.

Policy #

Enter the patient's private insurance policy number, up to 15 characters.

Group #

Enter the patient's private insurance group number, up to 15 characters.

Category #

Enter the patient's category number, up to 15 characters.

Phys ID #	Enter the license number of the attending physician, up to 15 characters.
Relation	Choose '1' if the patient is the insured, '2' if the patient is the insured's spouse, '3' if the patient is the insured's child, or '4' for any other relationship.
Insured Name Last	Enter the last name of the insured party, up to 20 characters.
Insured Name First	Enter the first name of the insured party, up to 15 characters.

Notes

The 'Show All Patients for Client' button will display a list of patients existing in the database for the specified client.

The 'Duplicate Patient SmartCheck' button displays a list of patients in the database for the specified client having similar sounding names and the same birth date. Enter the patient name, client, and birth date prior to running SmartCheck.

The 'Show Draw Schedule' button displays a list of scheduled draw dates for the patient. The date range displayed covers the previous 2 months and future 6 months.

The 'Note' button displays any notes entered for the client on the client entry screen.

Location Main Menu ➡ Patient Entry

To locate a specific patient, enter all or part of the patient's name or code, then press FIND. Scroll through patients by pressing the PREV and NEXT buttons. If the last FIND was performed on a patient name, PREV and NEXT scroll alphabetically, otherwise the scroll is by patient code.

The EZADD option is designed to facilitate entry of multiple test orders with the same starting & ending dates, cycle, and diagnosis. When this option is chosen, **MedRight** preloads these fields based on the most recently added order for the patient.

Prompts	Test Code	Enter the code of the test to be performed.																																					
	Start Date	Enter the first date on which the test is to be performed.																																					
	End Date	Enter the date on which the test order is to be stopped.																																					
	Full Term Order	Check this box if the test order is to be considered a full-term order by the Expiring Test Orders function, regardless of its actual duration.																																					
	Every #, Unit	<p>These 2 fields define the frequency with which the test is to be performed.</p> <p>The cycle # indicates how cycle units are to pass between tests. The cycle unit indicates the time period. Valid cycle units are:</p> <table><tr><td>D</td><td>Daily</td></tr><tr><td>W</td><td>Weekly</td></tr><tr><td>M</td><td>Monthly</td></tr><tr><td>Y</td><td>Yearly</td></tr><tr><td>T</td><td>1 Time Order</td></tr></table> <p>Examples:</p> <table><tr><th>To schedule a test</th><th>Enter #</th><th>Unit</th></tr><tr><td colspan="3">-----</td></tr><tr><td>Daily</td><td>1</td><td>D</td></tr><tr><td>Every 5 days</td><td>5</td><td>D</td></tr><tr><td>Weekly</td><td>1</td><td>W</td></tr><tr><td>Every 2 weeks</td><td>2</td><td>W</td></tr><tr><td>Every 2 months</td><td>2</td><td>M</td></tr><tr><td>Every year</td><td>1</td><td>Y</td></tr><tr><td>One time only</td><td>1</td><td>T</td></tr></table>	D	Daily	W	Weekly	M	Monthly	Y	Yearly	T	1 Time Order	To schedule a test	Enter #	Unit	-----			Daily	1	D	Every 5 days	5	D	Weekly	1	W	Every 2 weeks	2	W	Every 2 months	2	M	Every year	1	Y	One time only	1	T
D	Daily																																						
W	Weekly																																						
M	Monthly																																						
Y	Yearly																																						
T	1 Time Order																																						
To schedule a test	Enter #	Unit																																					

Daily	1	D																																					
Every 5 days	5	D																																					
Weekly	1	W																																					
Every 2 weeks	2	W																																					
Every 2 months	2	M																																					
Every year	1	Y																																					
One time only	1	T																																					
	STAT	Check this box to indicate a STAT order.																																					
	Note	Enter an explanatory note related to the order, if desired.																																					

Notes

The 'Show Draw Schedule' button displays a list of scheduled draw dates for the patient. The date range displayed covers the previous 2 months and future 6 months.

Enter the Every # and Unit to correspond EXACTLY to the physician orders. Do not 'interpret' the orders since this destroys the audit trail and places the laboratory and client at risk.

A test entered with monthly ('1M') frequency is not the same as one scheduled every 4 weeks ('4W'). A '1M' test is scheduled 12 times per year while a '4W' test is scheduled 13 times.

Only tests with an Every Unit of 'W' or 'T' may have a start date during the 5th week of a month.

The End Date will be preloaded, based on the settings in the 'Compliance Settings' option.

To discard an addition or change, click QUIT before completing the test order line.

It is recommended that test orders not be deleted, unless entered by accident. Rather, enter an 'End Date' for the order. Once a test is deleted, the system no longer 'remembers' that it existed. Therefore, any reports which show the patient's historical test schedule will be inaccurate.

Likewise, it is recommended that test orders cycles not be changed, unless entered by accident. If the physician changes the frequency with which a test is to be performed, enter an 'End Date' for the existing order and then add a new order with the new cycle. This ensures the ability to produce an accurate historical test schedule and maintains an accurate audit trail.

When ordering an EZOrder Panel, the order 'explodes' into the panel's component tests, with each component appearing as a separate test order. At no time does the EZOrder test actually appear as an order for the patient.

ADD or CHANGE PATIENTS

Date Specific Comments

Location Main Menu ▸
 Patient Entry

MedRight Home Care Scheduling Version 4.01.04

Patient Information

Last Name First

or Patient #

Demographics Insurance Test Orders **Date Specific Comments** Patient Notes

Last Name First Patient #

Date	Add or Replace	Report Comment

Add: click button Edit or Delete: click on comment, then button

Date Add or Replace

Report Comment

To locate a specific patient, enter all or part of the patient's name or code, then press FIND. Scroll through patients by pressing the PREV and NEXT buttons. If the last FIND was performed on a patient name, PREV and NEXT scroll alphabetically, otherwise the scroll is by patient code.

To add a new date-specific comment, click ADD. To edit or delete a specific comment, click on the comment in the displayed list, then click the desired action (EDIT, DELETE).

Prompts	Date	Enter the date on which the comment is to appear on the patient's requisition.
	Add or Replace	Choose 'A' if this comment is to appear on the patient requisition along with the

comment entered with the patient demographic information.

Choose 'R' if this comment is to appear instead of the comment entered with the patient demographic information

Comment

Enter the comment phrase, up to 60 characters.

Notes

This feature allows the 'generic' patient comment appearing on the patient demographic screen to be replaced or enhanced on the specified date.

Date-specific comments only appear on scheduled test requisitions.

Ensure that the date entered is an actual test date for the patient. **MedRight** does not check to ensure that a requisition is scheduled to be printed for this date.

The 'Show Draw Schedule' button displays a list of scheduled draw dates for the patient. The date range displayed covers the previous 2 months and future 6 months.

Enter the Every # and Unit to correspond EXACTLY to the physician orders. Do not 'interpret' the orders since this destroys the audit trail and places the laboratory and client at risk.

Only 1 date-specific comment may be entered for a specific date.

ADD or CHANGE BILLING ADJUSTMENTS

Increase or decrease client charges

Location Main Menu ►►►
Billing Adjustment Entry

The screenshot shows a software window titled "MedRight Home Care Scheduling Version 4.03.16 CHP" with a subtitle "Client Billing Adjustments". The window has a green header bar and a yellow main area. At the top, there are input fields for "Client Name" and "or Client #", followed by buttons for "Find", "Prev", "Next", "Edit", "Add", "Save", "Delete", and "Exit". Below these, there are input fields for "Client #" and "Client Name". A table with columns "Draw Date", "Amount", and "Reason" is displayed. Below the table, there is a text prompt: "Add: click button. Edit or Delete: click on comment, then button". At the bottom, there are input fields for "Date", "Amount", and "Reason", followed by "Save" and "Quit" buttons.

To locate a specific client, enter all or part of the client's name or code, then press FIND. Scroll through clients by pressing the PREV and NEXT buttons. If the last FIND was performed on a client name, PREV and NEXT scroll alphabetically, otherwise the scroll is by client code.

To add a new billing adjustment record, click ADD. To edit or delete a specific adjustment record, click on the adjustment in the displayed list, then click the desired action (EDIT, DELETE).

Prompts Date

Enter the date on which the billing adjustment is to appear on the client's billing statement.

Amount

Enter the dollar amount of the adjustment. A positive amount

increases the client's charges while a negative amount decreases the charges.

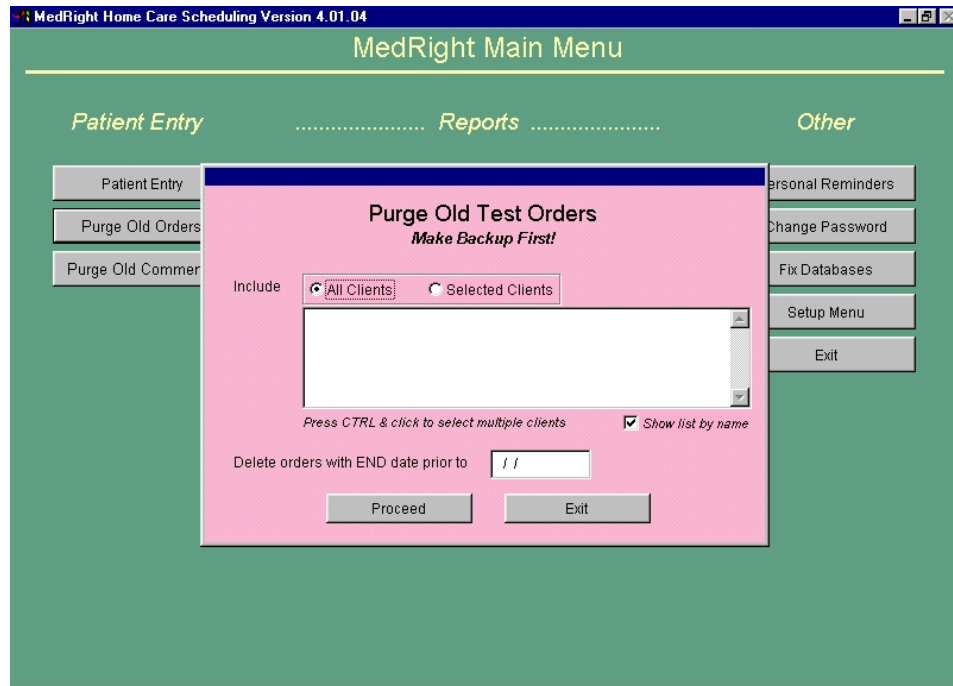
Reason

Enter an explanation for the billing adjustment, up to 40 characters. This reason appears under the patient name column on detailed billing statements.

Notes

DELETE OUTDATED TEST ORDERS

Location Main Menu ➡
Delete Old Orders



Prompts All or Selected Clients If only patient orders for specific clients are to be deleted, choose 'Selected Clients' and highlight one or more desired clients.

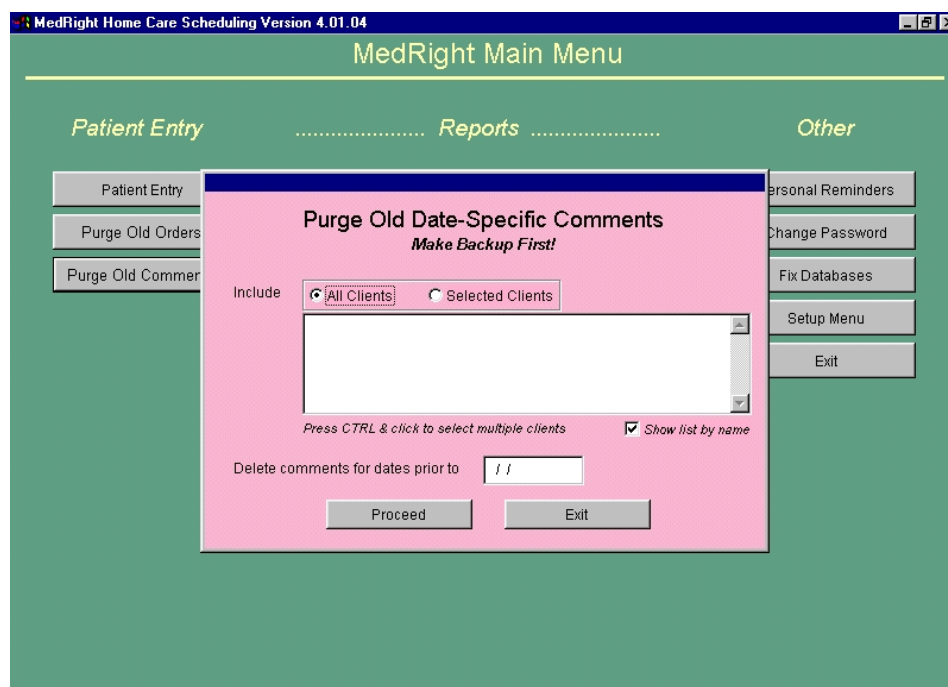
Delete orders with END DATE prior to Enter the date to be used in identifying orders considered outdated. This date is matched against the End Date entered for each patient test order.

Notes Once deleted, orders cannot be 'recovered'. Ensure that the correct End Date and Client information is entered.

IT IS STRONGLY RECOMMENDED THAT A ` OF THE SYSTEM BE MADE PRIOR TO DELETING OLD TEST ORDERS.

DELETE OUTDATED DATE-SPECIFIC COMMENTS

Location Main Menu ➡
Delete Old Comments

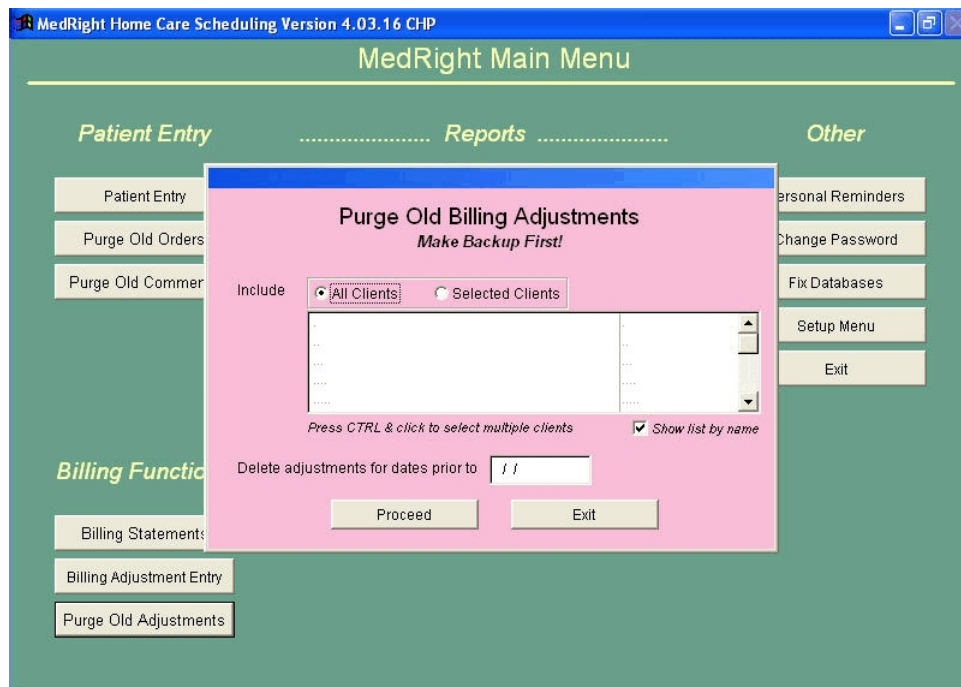


Prompts	All or Selected Clients	If only comments for specific clients are to be deleted, choose 'Selected Clients' and highlight one or more desired clients.
	Delete comments for dates prior to	Enter the date to be used in identifying comments considered outdated. This date is matched against the date entered for each patient date-specific comments.
Notes	Once deleted, comments cannot be 'recovered'. Ensure that the correct Date and Client information is entered.	

**IT IS STRONGLY RECOMMENDED THAT A BACKUP OF THE
SYSTEM BE MADE PRIOR TO DELETING OLD COMMENTS.**

DELETE OUTDATED BILLING ADJUSTMENTS

Location Main Menu ➡
Delete Old Adjustments



Prompts All or Selected Clients If only adjustments for specific clients are to be deleted, choose 'Selected Clients' and highlight one or more desired clients.

Delete adjustments for Enter the date to be used in identifying
dates prior to adjustment records considered
outdated.

Notes Once deleted, adjustment records cannot be 'recovered'. Ensure that the correct Date and Client information is entered.

IT IS STRONGLY RECOMMENDED THAT A ` OF THE SYSTEM BE MADE PRIOR TO DELETING OLD ADJUSTMENTS.

REPORTS

The **MedRight Home Care Scheduling System** produces a variety of useful operational reports.

Scheduled Draw Lists & Test Requisitions - A plain list identifying the tests to be drawn on a specific patient. Draw Lists are sorted alphabetically within phlebotomy route allowing for easy distribution to phlebotomists. Optionally, **MedRight** can be configured to print requisitions form..

Patient Draw Summary Report - A concise report showing each patient's test and scheduled draw dates, arranged chronologically by patient.

Expiring Test Orders Report - An invaluable report showing all patient with test orders due to expire within a specified range of dates. Also available in a letter format.

Patient Setup Sheet - A 'single page' report for each patient showing the demographic and test order information. This report is particularly useful when reviewing patient entries for accuracy. In addition, by printing this report for only patients whose information has been updated, this report serves as a convenient method of confirming patient changes with the client.

Patient Labels - Patient labels for use on generic client requisitions or specimen collection tubes.

Insurance Report - Prints a list of patients and their insurance information for a single client or multiple clients.

Patient List - Provides a list of patients for a single client or all clients. This report can be used to identify patients with a specific test code ordered, a specific physician, or insurance entries

Client List - A list of all clients in the system.

Test List - A list of all tests in the system.

Route List - A list of phlebotomy routes in the system.

Physician List - A list of all physicians in the system.

MedRight reports can be generated for any period of time (past or future) and can be reproduced as often as required. Additionally, any report can be previewed on the screen, allowing the option to select only specific pages for printing.

SCHEDULED DRAW LIST

Location Main Menu ➡
Scheduled Draw List

MedRight Home Care Scheduling Version 4.03.16 CHP

Scheduled Draw List

Include ☒ All Patients ☐ Selected Patients

Press CTRL & click to select multiple patients ☒ Show list by name

Include ☒ All Routes ☐ Selected Routes

Press CTRL & click to select multiple clients ☒ Show list by name

Include test orders for dates through

ONLY orders with draw date override

ONLY reminder call tests

Print summary counts

Prompts	All or Selected Patients	If only specific patients are to be printed, choose 'Selected Patients' and highlight one or more desired patients.
	All or Selected Routes	If only specific phlebotomy routes are to be printed, choose 'Selected Routes' and highlight one or more desired routes.
	Include Test Orders for Dates	Enter the first and last dates for which orders are to be printed.
	ONLY Orders with Draw Date Override	Only include orders where a test order started on a day that required the operator to override the phlebotomy route's usual draw day.

ONLY Reminder Call
Tests

Only include orders where the 'reminder
call' flag is set to Y in the master test
list.

Print summary counts

Choose 'Y' to print a report showing the
number of patients drawn by date, by
route. The summary report will appear
at the end of the patient detail report.
Choose 'N' to skip the summary report
or 'ONLY' to print only the summary
without the patient detail.

Notes

PATIENT DRAW SUMMARY

Location Main Menu ➡
Patient Draw Summary

Prompts	All or Selected Patients	If only specific patients are to be printed, choose 'Selected Patients' and highlight one or more desired patients.
	All or Selected Clients	If only specific clients are to be printed, choose 'Selected Clients' and highlight one or more desired clients.
	Include Test Orders for Dates	Enter the first and last dates for which orders are to be printed.
	Include Comments	Choose 'Y' to include patient comments on the report.

Notes

EXPIRING TEST ORDERS

Location Main Menu ➡
Expiring Test Orders

The screenshot shows the 'MedRight Home Care Scheduling Version 4.01.04' window. The 'MedRight Main Menu' is visible in the background with sections for 'Patient Entry' (Patient Entry, Purge Old Order, Purge Old Comm) and 'Other' (Personal Reminders, Change Password, Fix Databases, Setup Menu, Exit). The 'Expiring Test Orders' dialog box is open in the center. It has two sections: 'Include' for patients and 'Include' for clients. Each section has radio buttons for 'All' and 'Selected', a list box, and a checkbox for 'Show list by name'. Below these are date fields for 'Include test orders for dates' and a dropdown for 'Include order less than 6 months duration'. At the bottom are 'Preview', 'Print', and 'Exit' buttons.

Prompts	All or Selected Patients	If only specific patients are to be printed, choose 'Selected Patients' and highlight one or more desired patients.
	All or Selected Clients	If only specific clients are to be printed, choose 'Selected Clients' and highlight one or more desired clients.
	Include Test Orders for Dates	Enter the first and last dates for which requisitions are to be printed.
	Include Test Orders Less ...	Choose 'Y' to include testing which was not ordered for the maximum duration allowed by the Medicare compliance setting.

Include 1 Time Orders Choose 'Y' to include 1 time orders,
otherwise choose 'N'.

Notes Both report and letter formats are available.

PATIENT SETUP SHEET

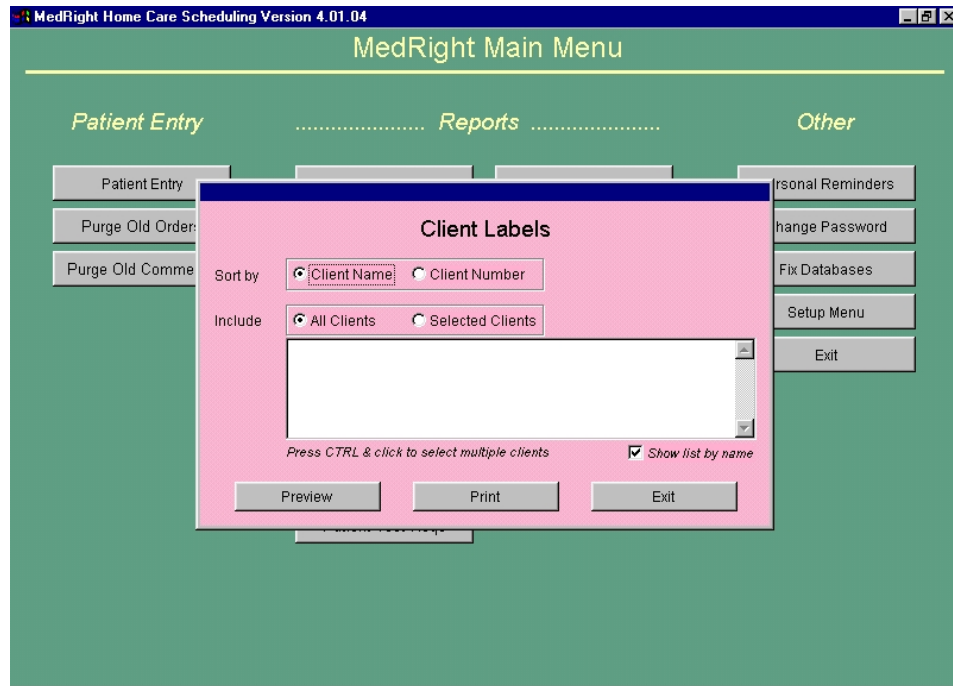
Location Main Menu ➡
 Setup Sheet

Prompts	All or Selected Patients	If only specific patients are to be printed, choose 'Selected Patients' and highlight one or more desired patients.
	All or Selected Routes	If only specific phlebotomy routes are to be printed, choose 'Selected Routes' and highlight one or more desired routes.
	Last Changed From	To limit printing to only those patients whose information was updated within a particular period of time, enter the start and end dates. Otherwise, leave blank.

Notes

CLIENT LABELS

Location Main Menu ➡
 Client Labels



Prompts	Sort By ...	Choose desired sort order.
	All or Selected Clients	If only specific clients are to be printed, choose 'Selected Clients' and highlight one or more desired clients.

Notes **MedRight** uses a label format compatible with the Avery #5160.

PATIENT LABELS

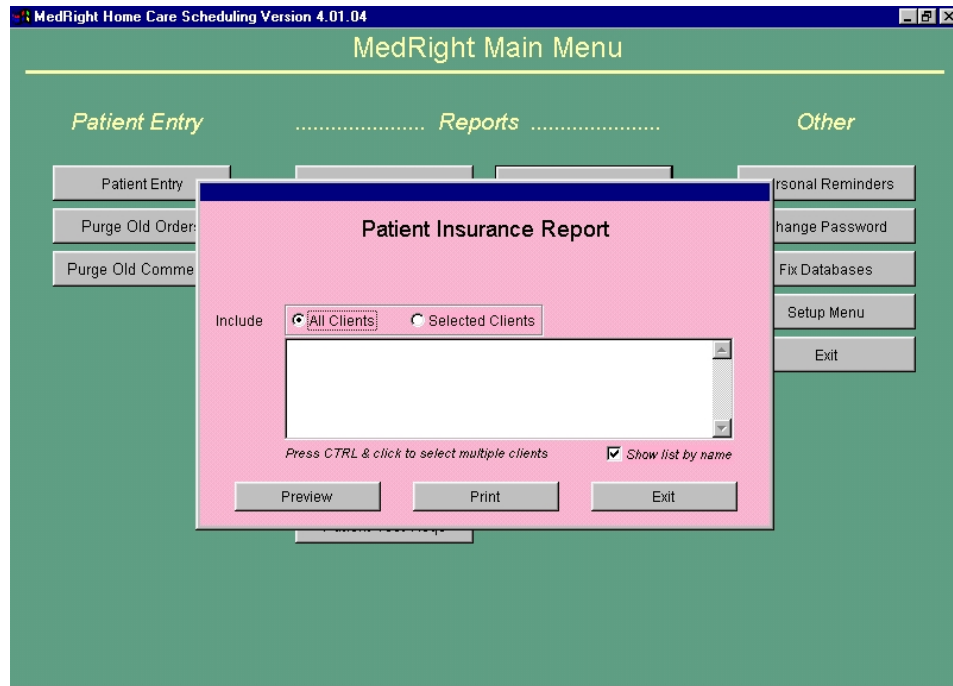
Location Main Menu ➡
Patient Labels

Prompts	All or Selected Patients	If only specific patients are to be printed, choose 'Selected Patients' and highlight one or more desired patients.
	All or Selected Clients	If only specific clients are to be printed, choose 'Selected Clients' and highlight one or more desired clients.
	Number of labels Per Patient	Choose the desired number of labels for each patient.

Notes **MedRight** uses a label format compatible with the Avery #5160.

PATIENT INSURANCE REPORT

Location Main Menu ➡
Insurance Report



Prompts All or Selected Clients If only specific clients are to be printed, choose 'Selected Clients' and highlight one or more desired clients.

Notes

MASTER PATIENT LIST

Location Main Menu ➡
Patient List

Prompts	Sort By...	Choose the desired sort order.
	All or Selected Patients	If only specific patients are to be printed, choose 'Selected Patients' and highlight one or more desired patients.
	All or Selected Routes	If only specific phlebotomy routes are to be printed, choose 'Selected Routes' and highlight one or more desired routes.
	Limit to Patients With ... Order For	Choose one or more tests to limit patients to be printed to only those with an order for the specified tests.

Test Order Cycle	Enter a test cycle to limit patients to only those containing one or more test orders with that cycle.
Doctor Name Containing	Enter a name to limit patients to only those where the specified characters exist in the physician name field.
Insurance Containing	Enter insurance information to limit patients to only those where the specified characters exist in any of the Medicare, Medicaid, or private insurance fields.

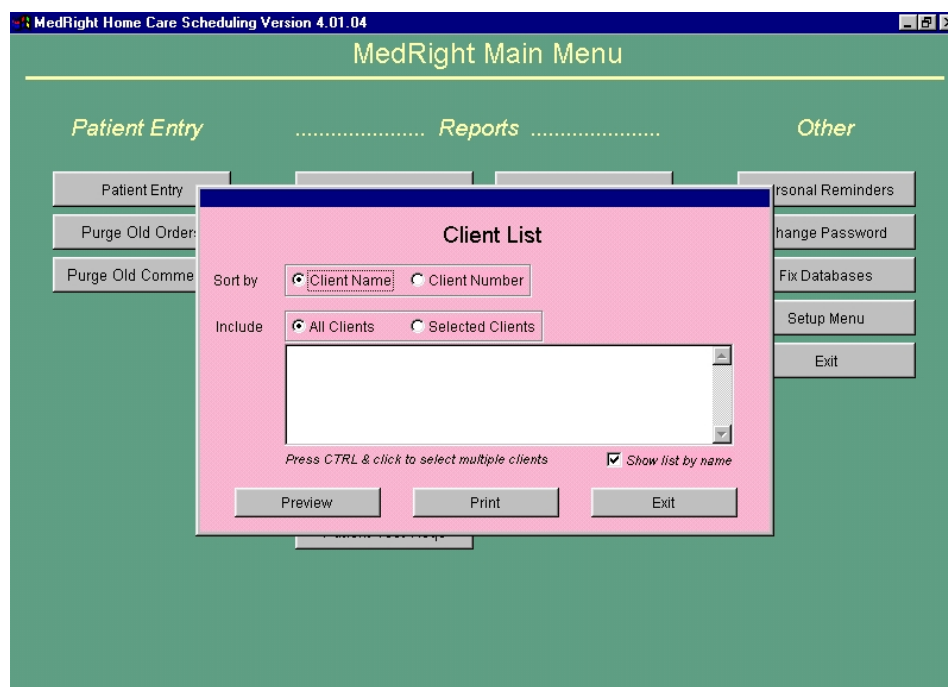
Notes

In addition to the patient number, name, location, and physician name, the report identifies the patient's test order status:

ACT	One or more active orders exist
EXP	All test orders have expired
NO	No test orders exist for the patient

MASTER CLIENT LIST

Location Main Menu ➡
 Client List

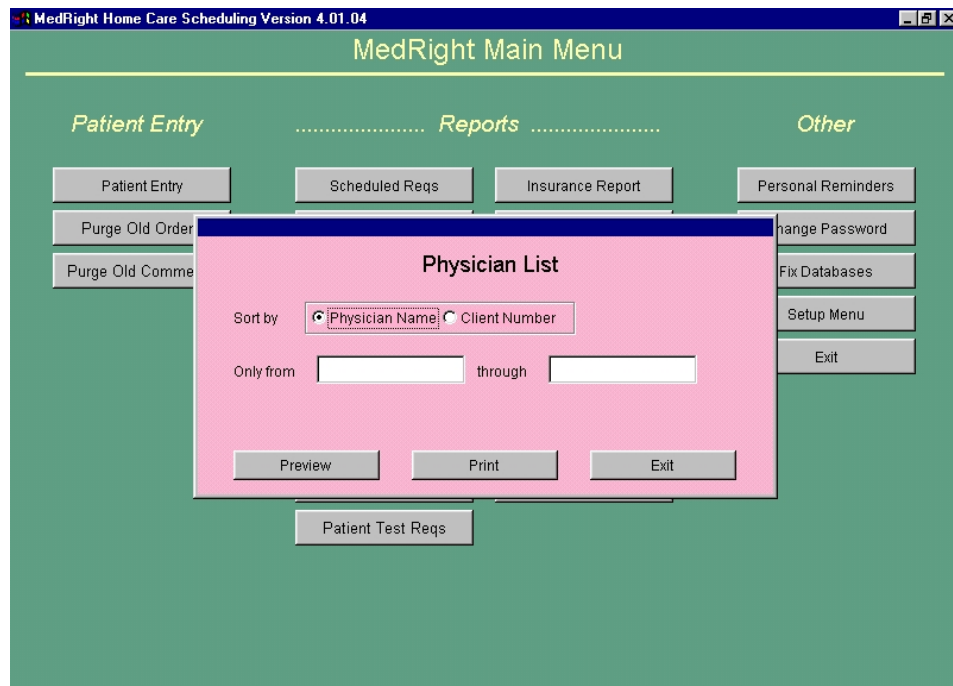


Prompts	Sort By...	Choose the desired sort order.
	All or Selected Clients	If only specific clients are to be printed, choose 'Selected Clients' and highlight one or more desired clients.

Notes

MASTER PHYSICIAN LIST

Location Main Menu ➡
 Physician List



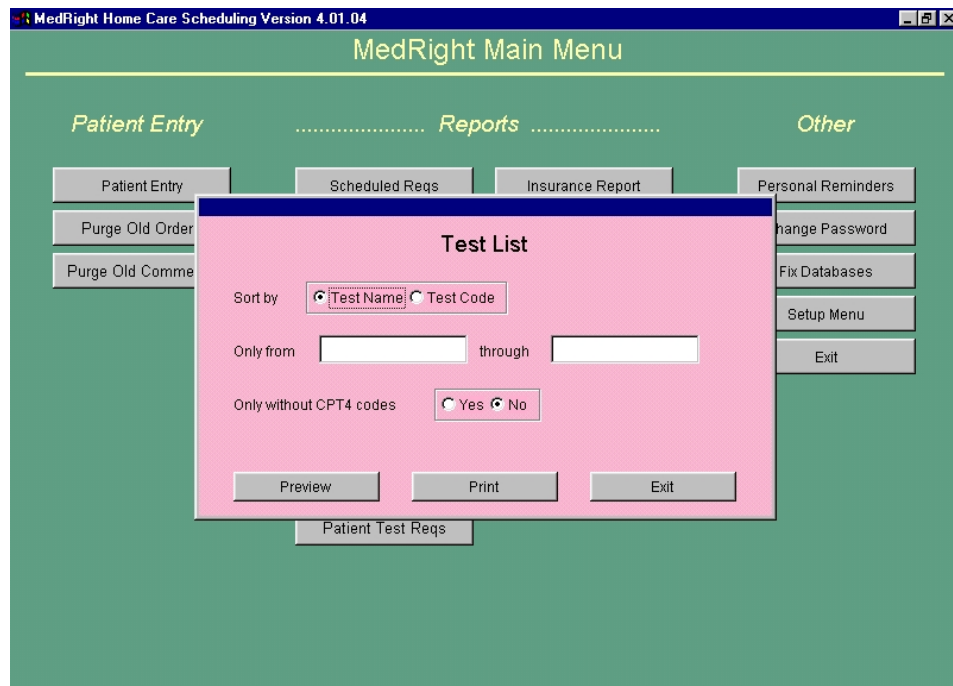
Prompts Sort By... Choose the desired sort order.

 Only From ... Through To limit the report to a range of clients/names, enter starting and ending clients/names.

Notes

MASTER TEST LIST

Location Main Menu ➡
 Test List

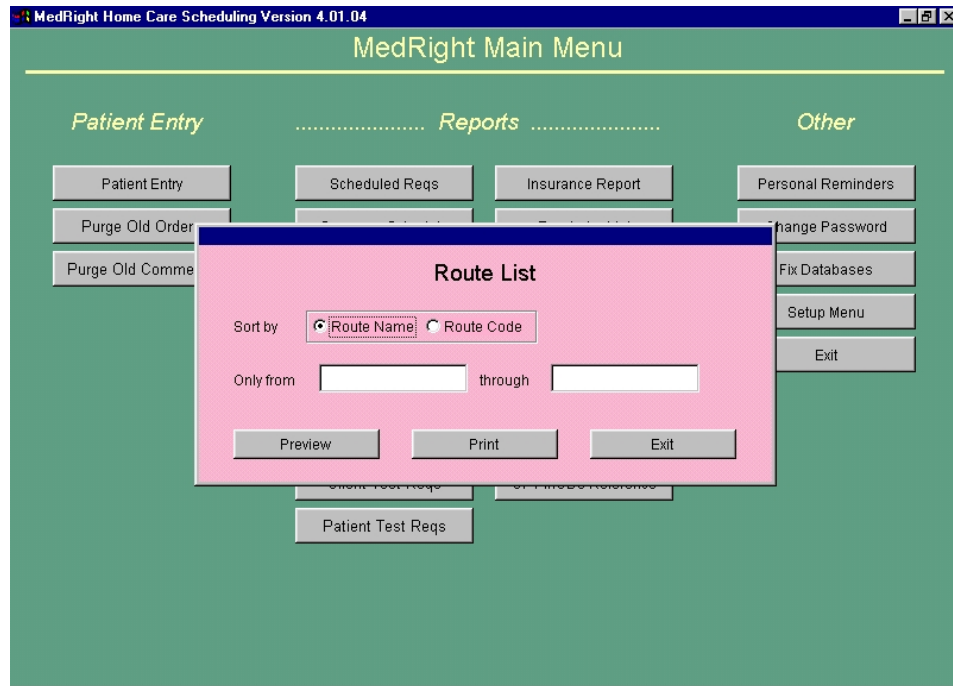


Prompts	Sort By...	Choose the desired sort order.
	Only From ... Through	To limit the report to a range of names/codes, enter starting and ending names/codes.
	Only without CPT4 Code	Choose 'Y' to include only tests where no CPT4 codes have been entered.

Notes

MASTER PHLEBOTOMY ROUTE LIST

Location Main Menu ➡
 Route List



Prompts	Sort By...	Choose the desired sort order.
	Only From ... Through	To limit the report to a range of names/codes, enter starting and ending names/codes.

Notes

UTILITIES

The **MedRight Home Care Scheduling System** contains useful utilities to facilitate your personal time management. In addition, a facility is provided to assist in repairing damaged databases.

Personal Reminders - Allows the entry of a list of important dates and their related notes. **MedRight** checks this information whenever started to ensure that important dates aren't forgotten.

Change Password - Allows user access password to be modified.

Fix Databases - Causes the **MedRight Home Care Scheduling System** to review the information in its databases and effect simple repairs.

Purge Client - Allows all of the patients for a client to be purged from the database in one easy step.

ADD or CHANGE PERSONAL REMINDERS

Location Main Menu ➡
 Personal Reminders

The screenshot shows a software window titled "MedRight Home Care Scheduling Version 4.01.04" with a sub-header "Personal Reminders". The window has a green header bar and a yellow body. At the top right, there is a row of buttons: Find, Prev, Edit, Add, Save, Delete, and Exit. Below this is a large white rectangular area for a list, with a vertical scrollbar on the right. Above the list area, there are two column headers: "Date" and "Note". Below the list area, there is a yellow bar containing the text "Add: click button. Edit or Delete: click on note, then button" and three buttons: Add, Edit, and Delete. At the bottom of the window, there is a yellow bar with a text input field on the left and two buttons, Save and Quit, on the right.

To add a new reminder, click ADD. To edit or delete a reminder, click on the reminder in the displayed list, then click the desired action (EDIT, DELETE).

Prompts	Date	Enter the date you wish to be reminded.
	Note	Enter key notes, tasks, etc related to the date.

Notes

CHANGE USER ACCESS PASSWORD

Location Main Menu ➡
Change Password

MedRight Home Care Scheduling Version 4.01.04

MedRight Main Menu

Patient Entry *Reports* *Other*

Patient Entry Scheduled Reqs Insurance Report Personal Reminders

Purge Old Orders Summary Schedule Reminder List Change Password

Purge Old Comments Client Test Reqs CPT4/ICD9 Reference Fix Databases

 Patient Test Reqs Setup Menu

 Exit

Enter new password or leave blank to keep current password

New Password

Repeat Password

Save

Prompts New Password Enter a 3-6 character password, consisting of any characters on the keyboard. Note that alphabetic characters are not case-sensitive and automatically converted to upper-case.

Repeat Password Enter the new password again. This password must match that entered above.

Notes A message is displayed indicating whether the password was updated.

FIX DATABASES

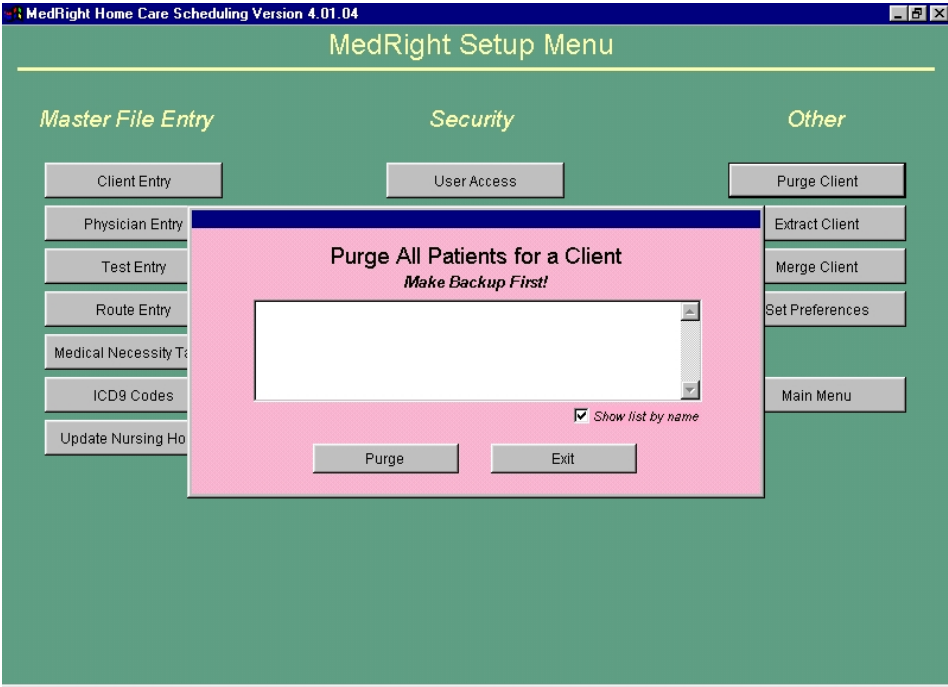
Location Main Menu ▢▢▢▢
 Fix Databases

Prompts

Notes Fixing the databases can never 'harm' the database and can be performed as desired without danger.

 This option will also repair a variety of database problems.

Location Main Menu ➡ Setup Menu ➡ Purge Client



Prompts	Client	Select the desired client from the list.
<p>Client</p>	<p>Select the desired client from the list.</p>	

Notes This option purges ALL patient information for the selected client.

For added protection, first create a copy of the patient information using the 'Extract Client' option. Purged information cannot be recovered!

IT IS STRONGLY RECOMMENDED THAT A BACKUP OF THE SYSTEM BE MADE PRIOR TO MERGING PATIENT INFORMATION.

SYSTEM PROBLEM NOTE

At what date & time did the problem occur?

What menu option was being performed?

What was the problem - Be Specific?

What error messages appeared on the screen or printer?

Was a specific client, patient, or test affected? Which one(s)?

What did you do to resolve the problem?

SCHEDULING SYSTEM BACKUP LOG

Date & Time	By Whom	Backup Set	Type	Notes
			Partial	
			Full	
			Partial	
			Full	
			Partial	
			Full	
			Partial	
			Full	
			Partial	
			Full	
			Partial	
			Full	
			Partial	
			Full	
			Partial	
			Full	
			Partial	
			Full	
			Partial	
			Full	

NOTE! To provide added protection, a backup should be removed from the laboratory at least once per week.

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